



MediaVision

Monthly Market Report

February 2023



SUMMARY

"The organic demand picture in February remains consistent with the general market conditions one would expect to find in a period of economic difficulty: across most sectors demand has softened YoY across both brand and non-brand terms, with the decline in search increasing in most cases.

This means that now more than ever is the time to focus strategy on areas where growth shoots are still visible and to target those areas before your competitors.

It's only by understanding patterns in organic demand and being able to respond to them by giving your target audience what they want when they want it that you'll be able to capture a greater share of visibility within your competitor set and stand out from the crowd in a challenging period.

MediaVision's Metis platform gives you this organic search insight weekly, empowering you to spot trends in consumer behaviour and respond fast and first to gain a significant advantage across digital channels."

If you want to find out more about how Metis's data can become the backbone of your strategy, [get in contact](#) and book a demo today.



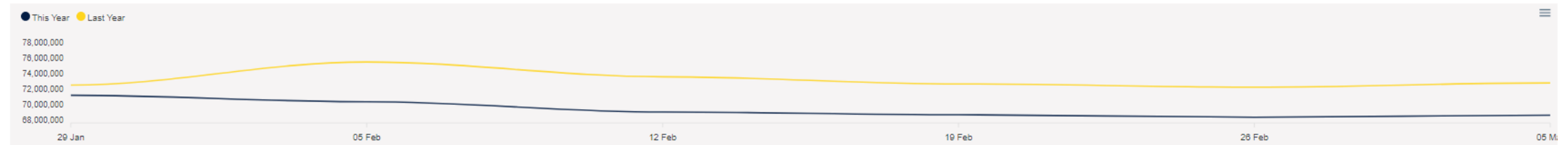
This report is compiled by Louis Venter, CEO and founder of MediaVision.

Louis has 18 years of organic search experience and has helped brands grow organically in difficult market conditions.

All data in this report is collated from our platform, Metis, that pulls search and demand data to provide market insight weekly for teams to react to be fast and first in the market.

Brand Search Data





Market Trends		Search Volumes				
Categories	Q search x	Analyse Sub Categories?	Change %	Period Difference ↓	This Period	Last Period
☐ Travel		Analyse	7.12 % ▲	2,300,478	34,615,710	32,315,232
☐ Jobs		Analyse	8.21 % ▲	1,242,246	16,368,511	15,126,265
☐ Supermarkets		Analyse	2.46 % ▲	981,076	40,824,830	39,843,754
☐ Law		Analyse	3.12 % ▲	9,000	297,820	288,820
☐ Alcohol		Analyse	-8.35 % ▼	-193,735	2,125,971	2,319,706
☐ Finance		Analyse	-1.51 % ▼	-497,992	32,424,823	32,922,815
☐ Consumer Electronics		Analyse	-0.68 % ▼	-524,642	76,192,294	76,716,936
☐ Beauty		Analyse	-8.69 % ▼	-659,687	6,933,576	7,593,263
☐ Property		Analyse	-7.21 % ▼	-1,675,389	21,562,902	23,238,291
☐ Homeware		Analyse	-8.01 % ▼	-3,600,782	41,362,646	44,963,428
☐ Department store		Analyse	-11.57 % ▼	-4,584,089	35,041,846	39,625,935
☐ Fashion		Analyse	-12.46 % ▼	-15,674,957	110,174,388	125,849,345

Across the majority of February, brand demand has declined YoY, with retail sectors again proving to be the worst hit.

In retail sectors, the average decline in brand demand was 7.2% YoY, with only Supermarkets seeing a rise in organic search at 2.5%.

It's clear that the impacts of the cost-of-living crisis will continue to impact the performance of brands in organic

search, emphasizing more than ever the importance of strong brand visibility in competitive markets, not to mention the need to boost share of search in a context where the market is shrinking.

Travel and Jobs both continue to see notable YoY growth, a persistent trend that indicates a shift of priorities in spending away from retail shopping towards experiences, and an increased focus on maximising financial security

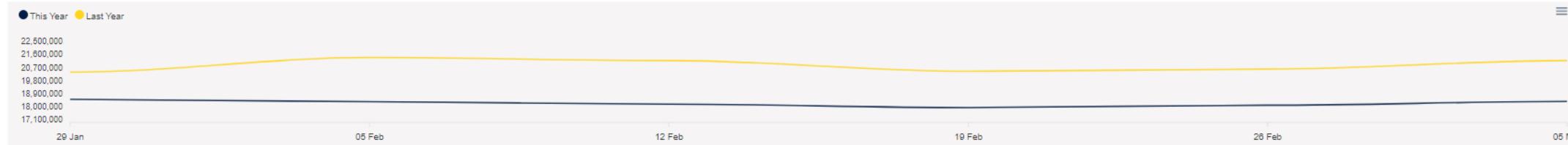
BRAND DEMAND TRACKER

Select Geo Location

United Kingdom



January 29, 2023 - March 5, 2023



Market Trends		Search Volumes				
All Phrases		Change %		Period Difference ↓	This Period	Last Period
Select category		All Items	-12.46%	-15,674,957	110,174,388	125,849,345
Fashion	☐ Shein	47.44 %	▲	878,943	2,731,850	1,852,907
	☐ Primark	25.63 %	▲	441,087	2,162,398	1,721,311
	☐ TK Maxx	9.60 %	▲	269,863	3,080,166	2,810,303
	☐ Next	2.26 %	▲	222,217	10,055,340	9,833,123
	☐ Crocs	122.43 %	▲	189,723	344,689	154,966
	☐ Uniqlo	46.23 %	▲	179,792	568,725	388,933
	☐ Gymshark	16.04 %	▲	145,091	1,049,781	904,690
	☐ New Balance	43.49 %	▲	132,988	438,769	305,781
	☐ Ann Summers	12.37 %	▲	111,984	1,017,196	905,212
	☐ Zara	3.30 %	▲	94,230	2,949,423	2,855,193
	☐ Nike	3.25 %	▲	76,525	2,433,441	2,356,916
	☐ Cos	21.84 %	▲	74,321	414,594	340,273
	☐ Birkenstock	62.14 %	▲	61,370	160,137	98,767
	☐ All Saints	16.86 %	▲	57,818	400,694	342,876
	☐ Lululemon	51.18 %	▲	57,543	169,967	112,424

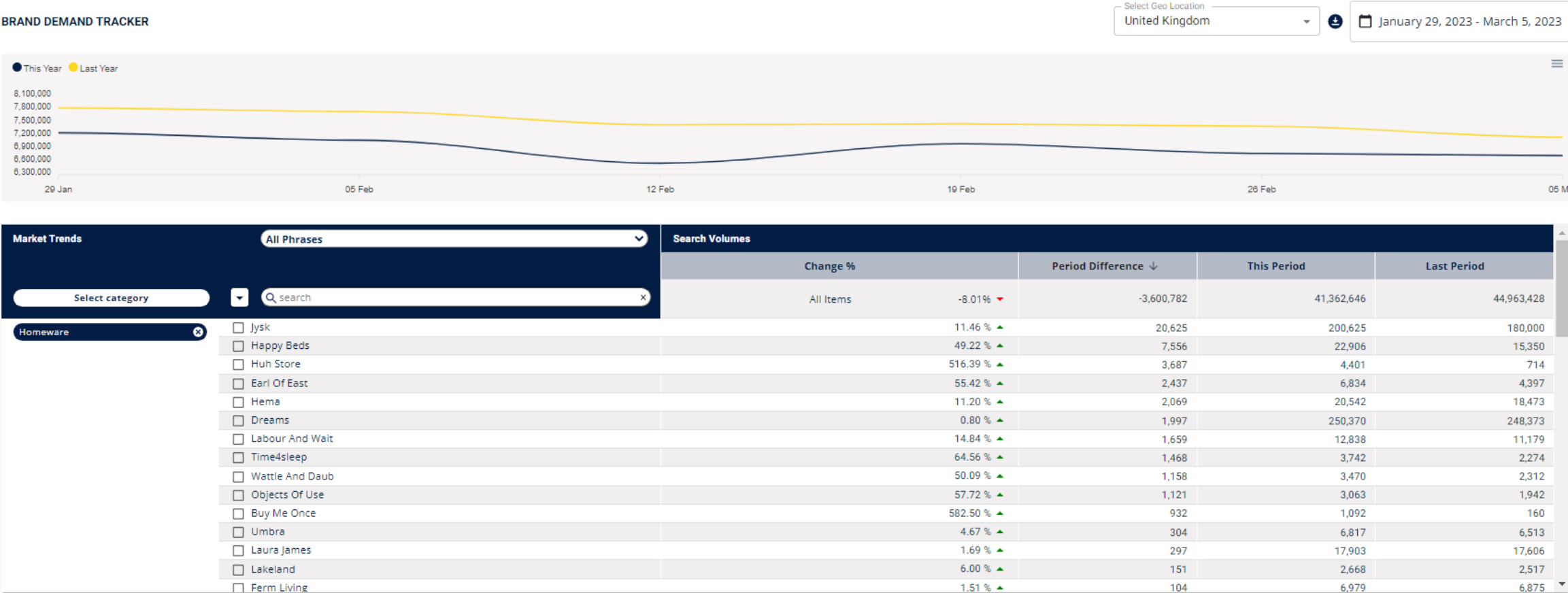
Fashion brand demand remains down YoY, with February seeing demand drop by 12.5% across the sector.

Particularly hard hit in February were fast fashion brands like Asos, Topshop, Boohoo, and Pretty Little Thing, who lost 28.9%, 39%, 18.7%, and 23% organic search YOY during the month.

Though some of this loss of search is doubtless due to a general decline in demand due to economic pressures, it's also clear that these fast fashion brands have struggled to keep up with the digital dominance of Shein, who's brand demand continues to increase YoY, with a 47.4% increase in February.

Alongside Shein, Primark continues to see strong performance in organic brand demand, likely as a consequence of releasing its click-and-collect digital service at the back end of 2022.

TK Maxx's brand demand has also been consistently strong during the cost-of-living crisis. Taken together with Shein's performance, it's clear that mounting economic pressure is making brands who can offer value alternatives to high street brands particularly attractive.

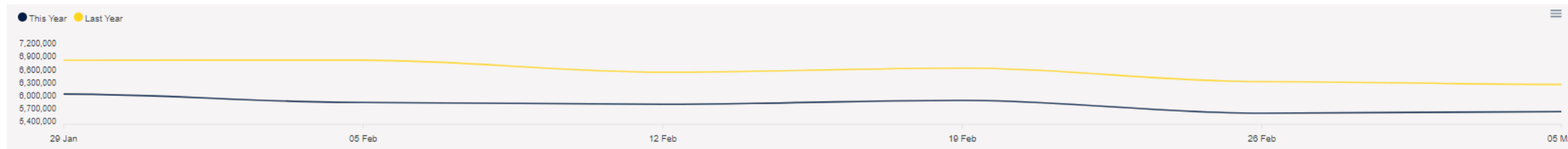


The majority of the biggest Homeware brands saw significant decline in search demand during February.

Argos, Homebase, Ikea, and Wayfair lost a particularly large portion of search in February, with Argos losing over a million searches YoY in the period and the others losing over 300,000 searches respectively.

Relatively few major brands saw growth in demand in February, though Lakeland's organic search demand increased by 6% and Earl of East saw a demand uptick of 55.4%.

BRAND DEMAND TRACKER



Market Trends

All Phrases

Select category

Department store

☐ Freemans

☐ Harrods

☐ Fortnum & Mason

☐ Harvey Nichols

☐ Fenwicks

☐ Liberty

☐ Selfridges

☐ Littlewoods

☐ House Of Fraser

☐ Argos

☐ John Lewis

☐ Debenhams

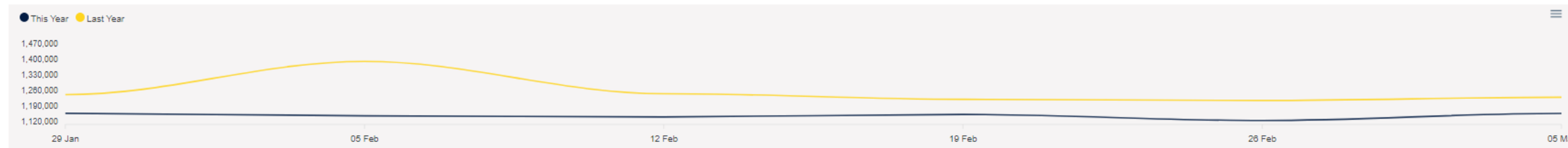
Search Volumes

Change %		Period Difference ↓	This Period	Last Period
All Items	-11.57% ▼	-4,584,089	35,041,846	39,625,935
	16.37 % ▲	77,889	553,720	475,831
	1.78 % ▲	7,737	443,517	435,780
	8.76 % ▲	3,260	40,480	37,220
	-2.53 % ▼	-6,713	259,114	265,827
	-15.30 % ▼	-13,867	76,758	90,625
	-12.50 % ▼	-18,332	128,333	146,665
	-6.39 % ▼	-51,972	761,037	813,009
	-6.25 % ▼	-112,368	1,685,526	1,797,894
	-14.00 % ▼	-165,540	1,016,892	1,182,432
	-5.31 % ▼	-1,105,707	19,701,726	20,807,433
	-17.24 % ▼	-1,347,167	6,466,415	7,813,582
	-32.14 % ▼	-1,851,309	3,908,328	5,759,637

Department store brand saw a significant drop in demand during February, with John Lewis and Debenhams the hardest hit, losing 17.2% and 32.1% demand YoY respectively.

Comparatively, Harrods and Fortnum and Mason, two brands which cater to higher-end audiences, were relatively unscathed by the general drop in demand, likely as a function of their target audience not being so affected by the current economic crisis.

BRAND DEMAND TRACKER



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category		All Items	-8.69% ▼	6,933,576	7,593,263
Beauty	☐ Superdrug	10.94 % ▲	165,880	1,681,686	1,515,806
	☐ Glossier	69.31 % ▲	37,081	90,580	53,499
	☐ Sephora	290.13 % ▲	33,350	44,845	11,495
	☐ Drunk Elephant	414.99 % ▲	18,799	23,329	4,530
	☐ Beauty Pie	18.84 % ▲	17,174	108,307	91,133
	☐ Fenty Beauty	25.95 % ▲	16,975	82,381	65,406
	☐ Lookfantastic	7.82 % ▲	16,450	226,769	210,319
	☐ Charlotte Tilbury	3.64 % ▲	16,280	463,102	446,822
	☐ Elemis	18.88 % ▲	12,898	81,212	68,314
	☐ Clinique	10.32 % ▲	11,928	127,526	115,598
	☐ The Ordinary	8.52 % ▲	11,247	143,203	131,956
	☐ Space Nk	8.87 % ▲	10,780	132,272	121,492
	☐ Huda Beauty	16.67 % ▲	10,192	71,338	61,146
	☐ Aesop	15.56 % ▲	8,905	66,117	57,212
	☐ Rituals	12.93 % ▲	8,696	75,945	67,249

Demand also softened for Beauty brands in February, with some major brands seeing significant drops in organic search, including Jo Malone (down 5.3%), The Perfume Shop (down 3.9%), Bodyshop (down 18.8%) and Feel Unique (down 83.5%).

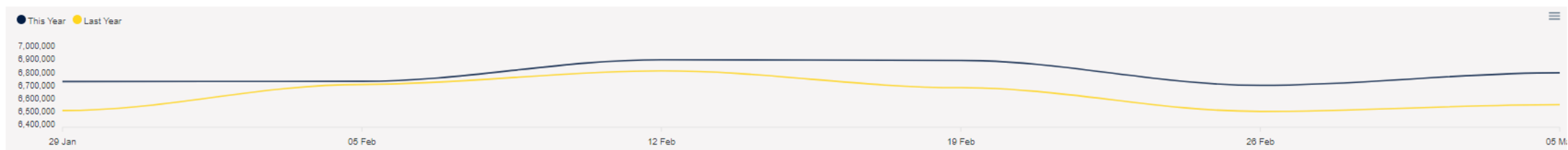
Though most brands saw declines in search volumes, we're still seeing some notable names at the top stealing share of search in the market: Superdrug has seen a 10.9% increase in demand YoY, whilst Sephora's launch in the UK prompted a lift in organic search of 290.1%.

BRAND DEMAND TRACKER

Select Geo Location
United Kingdom



January 29, 2023 - March 5, 2023



Market Trends

All Phrases

Select category

Q search

Supermarkets

☐ Costco

☐ Lidl

☐ Asda

☐ M&S

☐ Iceland

☐ Farmfoods

☐ Aldi

☐ Spar

☐ Ocado

☐ Heron Foods

☐ Oddbox

☐ Londis

☐ Costcutter

☐ Budgens

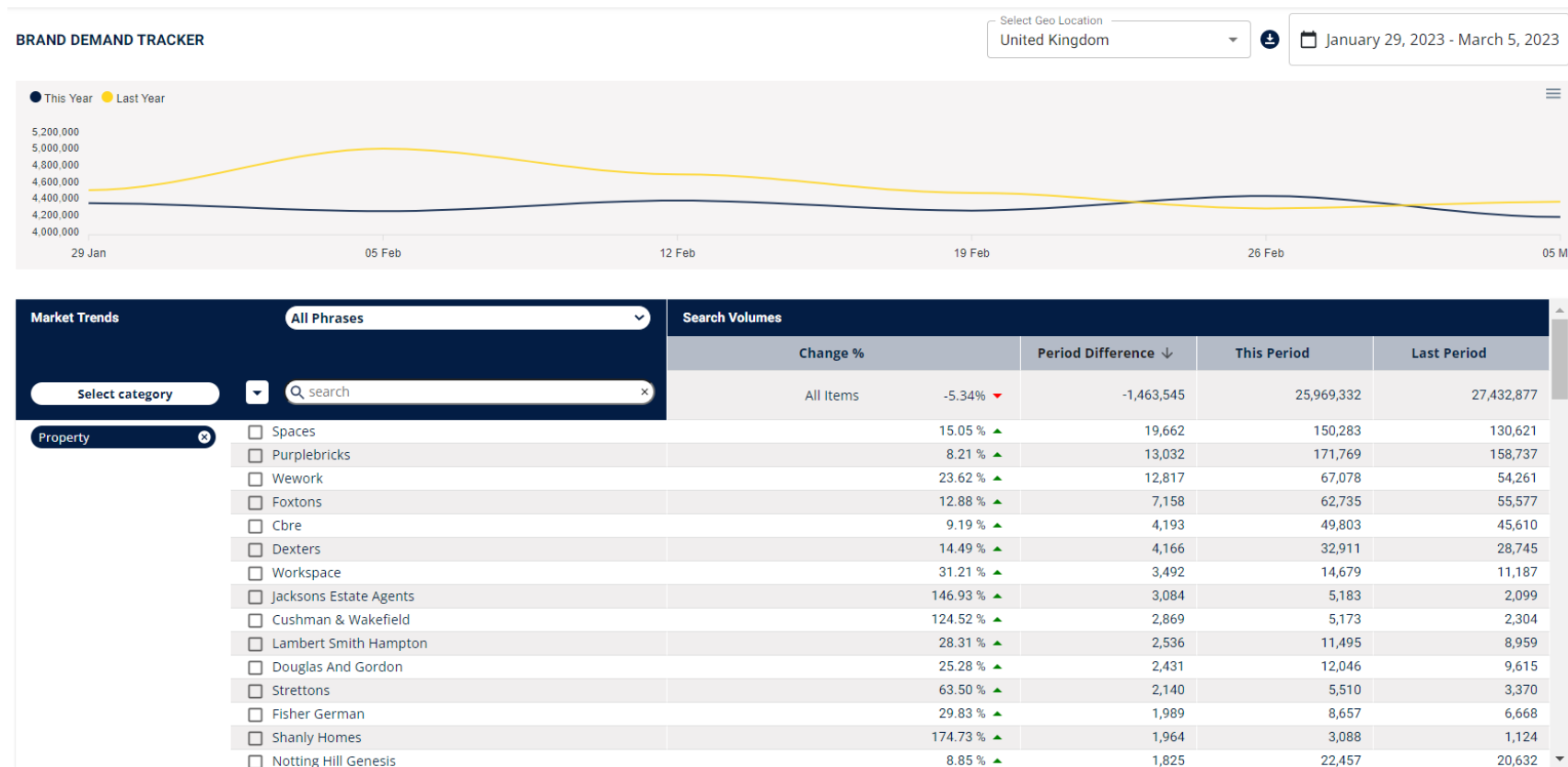
☐ Whole Foods Market

Search Volumes

Change %		Period Difference ↓	This Period	Last Period	
All Items		2.46% ▲	981,076	40,824,830	39,843,754
		25.33% ▲	388,702	1,923,318	1,534,616
		12.86% ▲	337,606	2,963,443	2,625,837
		3.79% ▲	285,600	7,818,300	7,532,700
		7.26% ▲	158,911	2,348,353	2,189,442
		6.08% ▲	156,800	2,736,872	2,580,072
		43.48% ▲	70,235	231,779	161,544
		1.75% ▲	67,813	3,933,198	3,865,385
		48.98% ▲	62,858	191,190	128,332
		4.76% ▲	62,084	1,365,854	1,303,770
		32.63% ▲	16,602	67,480	50,878
		42.52% ▲	16,595	55,627	39,032
		20.36% ▲	16,230	95,952	79,722
		14.22% ▲	7,850	63,073	55,223
		8.50% ▲	3,926	50,120	46,194
		37.49% ▲	3,864	14,172	10,308

The cost of living crisis has left its stamp on brand search in the Supermarket sector, with Lidl, Asda, and Costco's value offerings coming out as the clear preference for consumers.

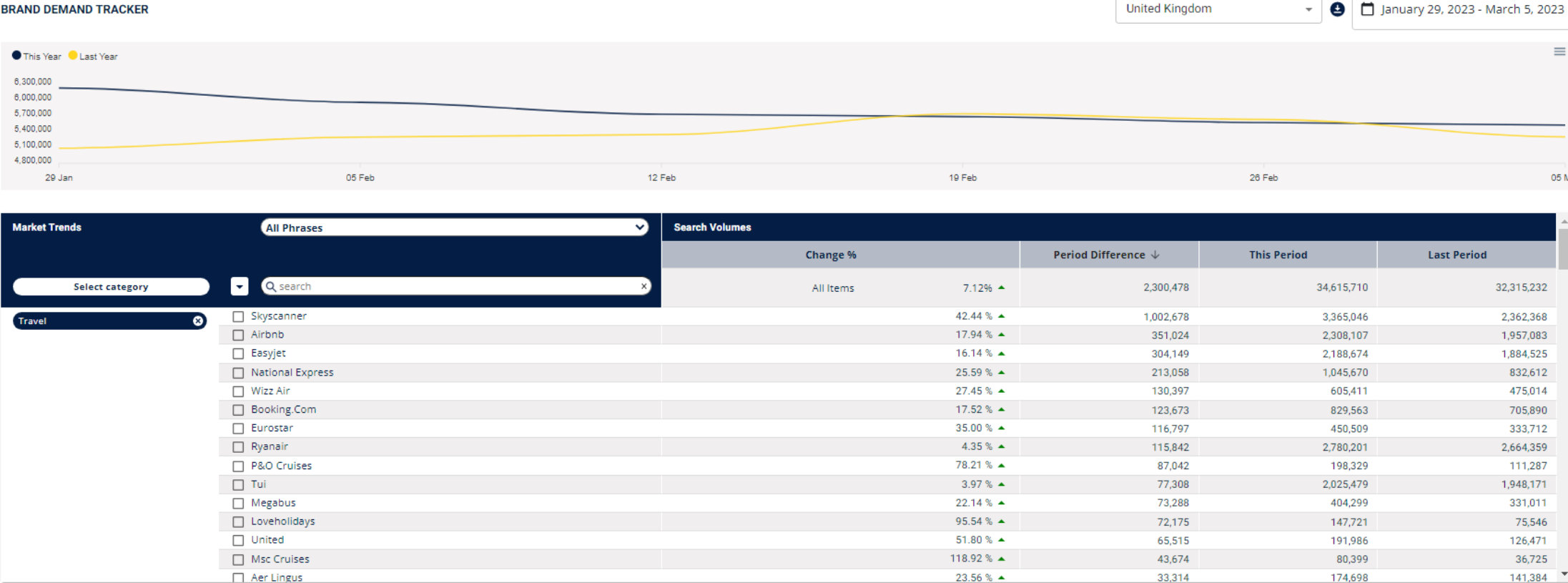
Given sector demand only increased 2.5%, it's clear that the comparative uplift in demand for these brands comes from stealing share of search from competitors like Sainsbury's (down 42.1%), and Waitrose (down 8.6%).



Property brand demand has been soft YoY in Residential for a number of months now, with February proving no exception.

Across the subsector demand dropped 5.5% across the month, with Haart's and Savills seeing the largest drops in organic search of 26.7% and 10% YoY respectively.

By contrast, Commerical demand increased by 8.5% YoY in February, with flexible office brands like Spaces, Wework, and Workspace seeing the greatest upticks in demand with surges of 15.1%, 23.6%, and 31.2% respectively.



Brand demand for Travel increased YoY in February, with value travel option and price comparison sites winning out.

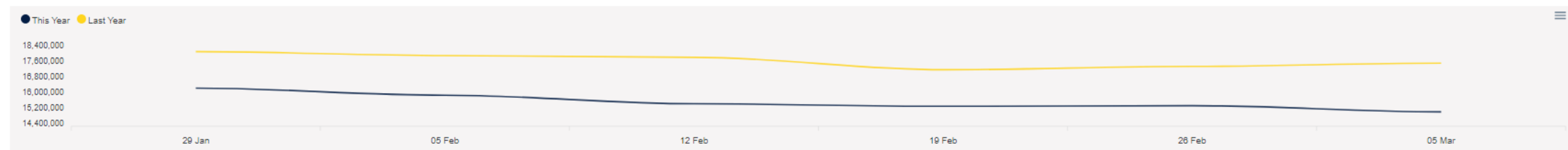
It’s notable that coach providers like National Express and Megabus have seen such strong increases in demand YoY, with frequent train strikes and sky-high train prices causing people to look for better value, more reliable alternatives to

get across the country.

Value airlines like Easyjet, Wizz Air and Ryanair are all seeing strong upticks in demand YoY as well as travel on a budget becomes increasingly important for consumers.

Non-Brand Search Data





Market Trends		Search Volumes				
Categories Q search	Analyse Sub Categories?	Change %	Period Difference ↓	This Period	Last Period	
☐ Pharmaceutical	Analyse	12.58 %	883,425	7,907,761	7,024,336	
☐ Jobs	Analyse	1.29 %	32,049	2,520,116	2,488,067	
☐ Beauty	Analyse	-1.33 %	-21,979	1,635,277	1,657,256	
☐ Alcohol	Analyse	-2.46 %	-64,335	2,554,712	2,619,047	
☐ Wellbeing	Analyse	-1.21 %	-82,061	6,708,674	6,790,735	
☐ Consumer Electronics	Analyse	-5.25 %	-157,926	2,851,455	3,009,381	
☐ Travel	Analyse	-15.30 %	-759,236	4,201,476	4,960,712	
☐ Property	Analyse	-14.34 %	-862,180	5,151,835	6,014,015	
☐ Homeware	Analyse	-15.43 %	-1,116,521	6,119,699	7,236,220	
☐ Finance	Analyse	-26.30 %	-4,720,125	13,228,670	17,948,795	
☐ Fashion	Analyse	-12.38 %	-5,758,913	40,765,298	46,524,211	

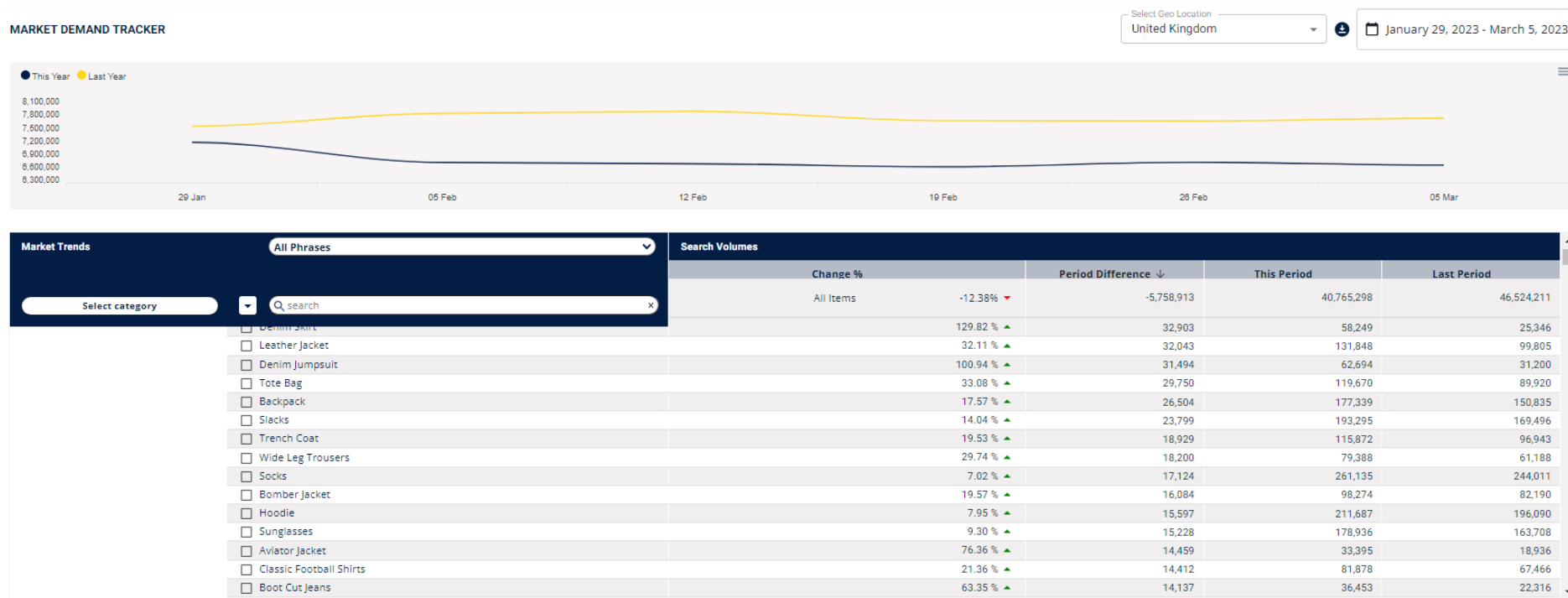
Non-brand search followed a similar trend to brand demand in February, with retail sectors struggling to keep up with last year's volumes (down 11% overall), though in contrast to brand search Travel also saw a significant dip in demand in February.

In fact, even Jobs only saw an increase of 2.2% across the month, with only Pharmaceutical searches seeing an increase of more than 10% YoY demand during the month.

The particularly large impact of the cost-of-living crisis on non-brand search terms only serves to highlight the importance of being competitive on the SERP for phrases that often come with high-

purchasing intent associated.

In a shrinking market where brand loyalties are more likely to shift in line with economic conditions, reaching the right customers at the right time is absolutely central to growing your business through digital, and search data is crucial to guiding the strategy to enable you to do this.



Non-brand demand for Fashion has been down for some time now, and as it looks like this is unlikely to change for some time it's more imperative than ever that brands pay close attention to trending searches.

Warm-weather searches were popular throughout February, with 'Denim skirt', 'Sunglasses', and 'Slacks'

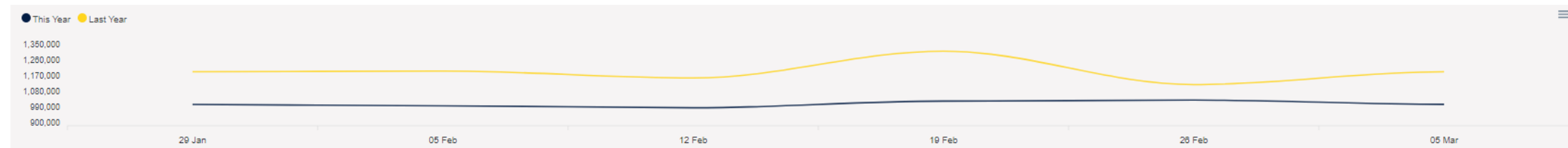
all seeing strong increases in organic demand.

Within specific categories of search demand was generally down YOY throughout February, with 'Dress' terms losing 19.3% search YoY, 'Shirts' dropping 5.9%, and 'Shoes' terms softening in demand by 3.2%.

MARKET DEMAND TRACKER

Select Geo Location
United Kingdom

January 29, 2023 - March 5, 2023



Market Trends		Search Volumes				
All Phrases		Change %		Period Difference ↓	This Period	Last Period
Select category		All Items	-15.43%	-1,116,521	6,119,699	7,236,220
Homeware	☐ Camping Chairs	10.20 %	▲	10,482	113,213	102,731
	☐ Folding Camping Chairs	61.72 %	▲	7,032	18,425	11,393
	☐ Sofa Throws	26.54 %	▲	6,651	31,708	25,057
	☐ Infinity Sofa	0.00 %	▼	6,343	6,343	0
	☐ Fishing Chair	60.78 %	▲	6,082	16,088	10,006
	☐ Standing Desk	13.59 %	▲	4,801	40,118	35,317
	☐ Book Shelf	21.58 %	▲	3,246	18,285	15,039
	☐ Recliner Chair	13.88 %	▲	2,963	24,303	21,340
	☐ Pay Weekly Sofas	45.92 %	▲	2,872	9,127	6,255
	☐ Net Curtains	6.76 %	▲	2,636	41,612	38,976
	☐ Folding Garden Chairs	11.89 %	▲	2,403	22,608	20,205
	☐ Radiator Shelf	13.79 %	▲	2,216	18,282	16,066
	☐ Thermal Curtains	58.70 %	▲	2,121	5,734	3,613
	☐ Door Curtain	28.06 %	▲	2,046	9,338	7,292
	☐ Kids Dressing Table	34.97 %	▲	2,044	7,889	5,845

February saw non-brand demand drop significantly in the Homeware sector, with a decline of over 15% across the month.

Searches for 'Lamps' were down 20.4% YoY, whilst 'Chairs' dipped by 20.9% and 'Tables' saw a drop in demand of 8.7%.

In a context where the post-Covid drop in demand for

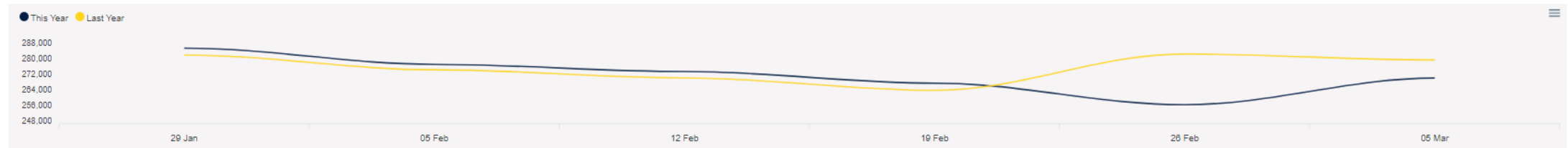
Homeware items has continually dropped significantly spotting pockets of growth in demand is vital.

Take the example of outdoors chairs, like 'Fishing chairs', 'Camping chairs', and 'Folding garden chairs', all of which have seen strong growth YoY in February indicating a potential opportunity to optimize maximise visibility in those areas.

MARKET DEMAND TRACKER

Select Geo Location
United Kingdom

January 29, 2023 - March 5, 2023



Market Trends

All Phrases

Select category

Beauty

Q search

☐ Perfume

☐ Mascara

☐ Contour Stick

☐ Makeup Bag

☐ Bronzer

☐ Hair Color Spray

☐ Best Foundation For Mature Skin

☐ Festival Makeup

☐ Spray Color Hair

☐ Lip Balm

☐ Foundation Brush

☐ Eyelash Serum

☐ Sky High Mascara

☐ Eyebrow Lamination

Search Volumes

Change %	Period Difference ↓	This Period	Last Period
All Items -1.33%	-21,979	1,635,277	1,657,256
Perfume 18.24%	15,235	98,783	83,548
Mascara 29.20%	5,806	25,690	19,884
Contour Stick 68.14%	4,572	11,282	6,710
Makeup Bag 19.83%	4,485	27,099	22,614
Bronzer 44.36%	3,582	11,656	8,074
Hair Color Spray 69.31%	3,507	8,567	5,060
Best Foundation For Mature Skin 32.82%	3,267	13,222	9,955
Festival Makeup 64.77%	3,169	8,062	4,893
Spray Color Hair 44.80%	3,119	10,081	6,962
Lip Balm 26.24%	3,059	14,717	11,658
Foundation Brush 23.01%	3,040	16,250	13,210
Eyelash Serum 24.42%	2,814	14,337	11,523
Sky High Mascara 33.35%	2,757	11,025	8,268
Eyebrow Lamination 16.28%	2,695	19,250	16,555

Demand for Beauty non-brand terms was broadly equivalent to trends in 2022, though within the sector we're seeing some strong deviations in searches for individual keywords.

This is a clear illustration of the point that whilst demand across a whole sector might appear relatively

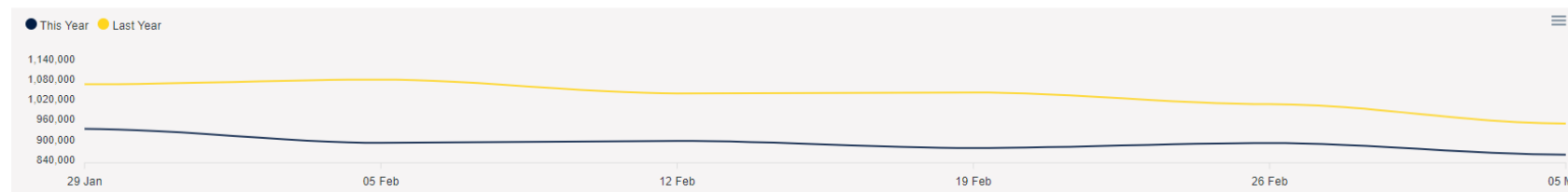
static, within subcategories there can still be a dynamic picture unfolding.

Perfume, Mascara, and Bronzer all saw significant increases in demand during February, whilst searches for 'Eyelashes' were down 19.4%, and 'Nails' searches for 11.3% YoY.

MARKET DEMAND TRACKER

Select Geo Location
United Kingdom

January 29, 2023 - March 5, 2023

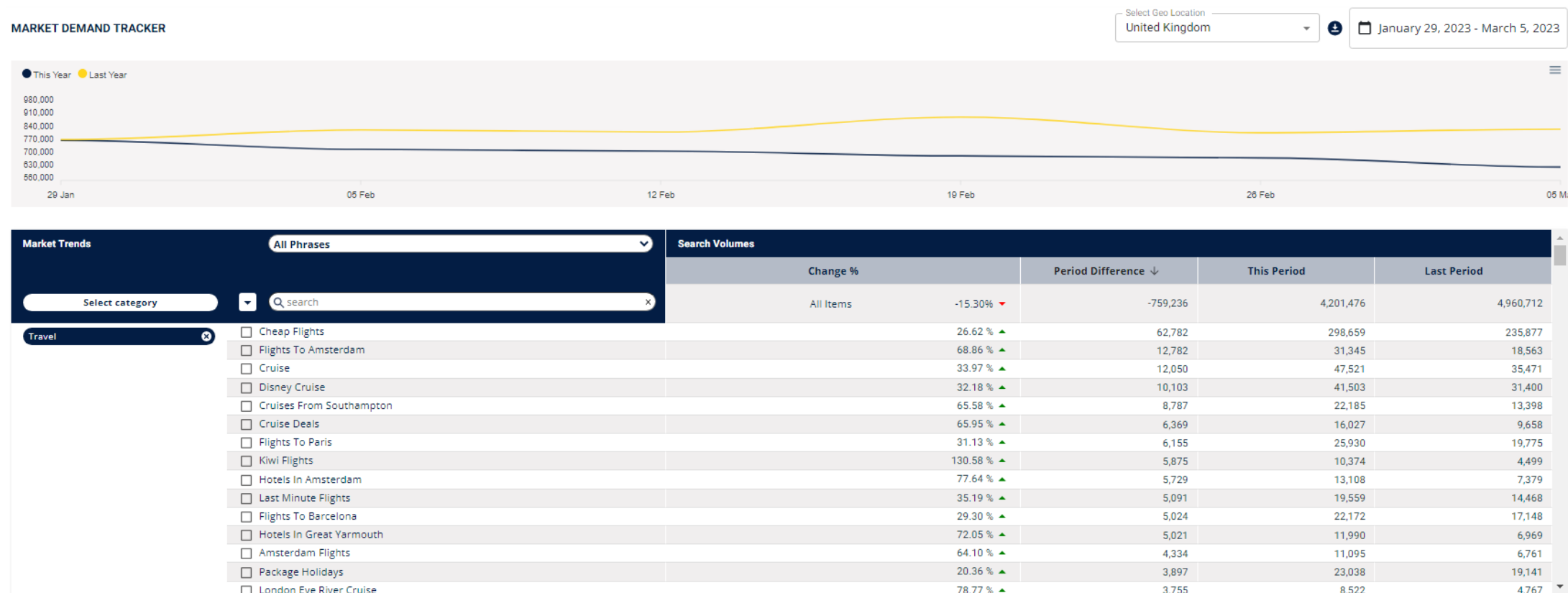


Market Trends		Search Volumes				
All Phrases		Change %		Period Difference ↓	This Period	Last Period
Select category		All Items	-13.43% ▼	-834,394	5,376,315	6,210,709
Property	☐ Swansea Student Accommodation	375.55 % ▲	9,325	11,808	2,483	
	☐ Houses For Sale In Port Talbot	618.87 % ▲	8,986	10,438	1,452	
	☐ Houses For Sale In Pembrokeshire	120.59 % ▲	5,728	10,478	4,750	
	☐ House Sitting	44.32 % ▲	5,707	18,585	12,878	
	☐ Shared Ownership Houses Near Me	215.11 % ▲	5,636	8,256	2,620	
	☐ Houses For Sale In Dumfries And Galloway	0.00 % ▼	5,400	5,400	0	
	☐ Houses For Sale In Bournemouth	82.41 % ▲	4,913	10,875	5,962	
	☐ Property For Sale Dumfries And Galloway	74.51 % ▲	4,578	10,722	6,144	
	☐ Summer Houses For Sale	33.94 % ▲	4,573	18,048	13,475	
	☐ Coworking Space	17.77 % ▲	3,598	23,844	20,246	
	☐ Canal Boats For Sale	30.57 % ▲	3,436	14,675	11,239	
	☐ Rent My Property	21.71 % ▲	3,333	18,685	15,352	
	☐ Flats To Rent Bournemouth	79.77 % ▲	3,162	7,126	3,964	
	☐ Properties For Sale In France	61.33 % ▲	3,107	8,173	5,066	
	☐ Houses For Sale In Bridlington	44.79 % ▲	3,036	9,814	6,778	

Demand for non-brand property terms declined 13.4% YoY in February across keywords we track, though as with brand search it was residential property which saw the greatest declines in demand whilst commercial property saw YoY upticks in demand.

In residential demand was 14.9% softer YoY across the month, with 'house' searches down 16%, 'flat' searches up 1.2%, 'sale' searches down 15.9%, and 'rent' searches down 6.5%.

In commercial property 'coworking' searches increased by 21.8%, with office terms generally increasing in demand by 8.1% YoY across the month. In comparison with February 2022, searches for commercial property in London increased by 43.9% this year.



Despite brand search increasing YoY during February, non-brand demand in Travel saw a significant decrease last month, though 'Cheap flights' remains a very popular search, with a YoY uptick of 26.6% in organic.

'Cruise' searches have also increased YoY, with a

strengthening to 34.1% in demand across February.

All the while, 'Flights' decreased by 13.3% in search, while 'Hotel' searches dropped by 17.6%.



MediaVision

wearemediavision.com